DISCOVERCRM

PROJECT-SALESACHIEVER CRM

EXTENDED PROFILE

Project-SalesAchiever

OVERVIEW

Project-SalesAchiever CRM is a software package tailored towards the construction and engineering industries.

Project-SalesAchiever CRM has been developed specifically to be used by construction companies both in the office and in the field. It allows sales staff to manage construction specific sales processes via an intuitive workflow and interface. The front end user is at the heart of the design and ease of use is an important facet.

Data loading tools are geared up towards importing data from project lead information providers such as Dodge and Reed. Another key feature is the powerful ‘drag and drop’ interface that allows users to add functionality to CRM tool as and when required. Project-SalesAchiever has also been designed to integrate easily with third-party ERP solutions including Avante, SAP, and Oracle.

The CRM solution can be hosted in the cloud installed on-premise and will run on any browser enabled handheld or desktop device. Project-SalesAchiever CRM pricing is flexible; firms can select either a monthly subscription, which is based on a per-user, per month structure, or pay up-front for the package.

FEATURE OVERVIEW

Project-SalesAchiever

SOFTWARE SPECIFICATION

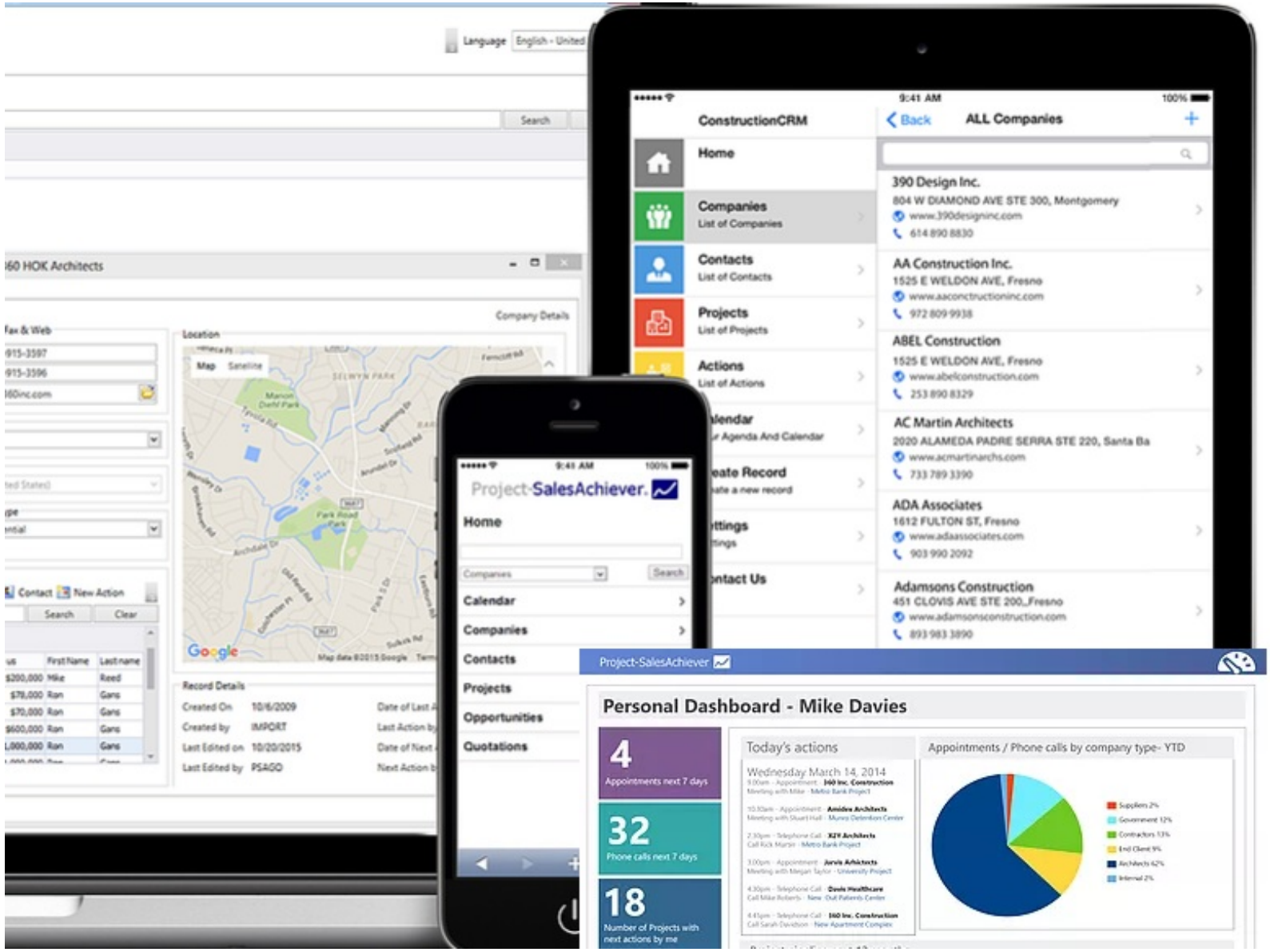
OVERVIEW	
PRODUCT NAME	Project-SalesAchiever CRM
SOFTWARE FEATURES	
API ACCESS	✗
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✗
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✓
SALES GAMIFICATION	✗
QUOTATION HANDLING	✓
TASK ASSIGNMENT	✓

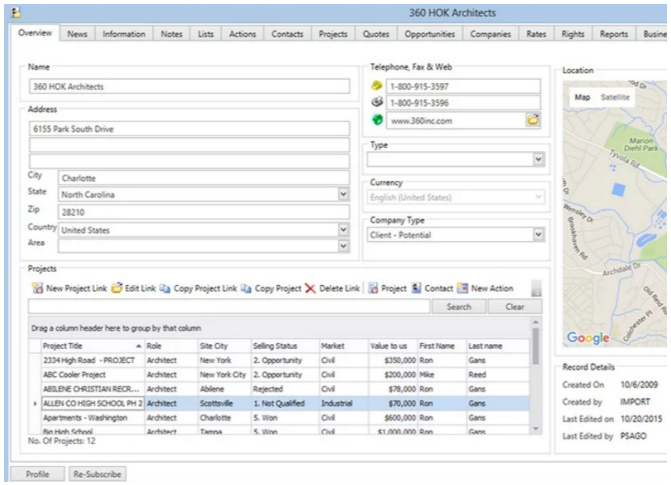
TERRITORY/QUOTA MANAGEMENT	✗
SUPPLEMENTARY FEATURES	
CPQ	✓
CUSTOMER SERVICE AUTOMATION	✗
MARKETING AUTOMATION	✗
SOCIAL RELATIONSHIP MANAGEMENT	✗
CUSTOMER SIZE	
SMALL (1-50 USERS)	✗
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✓
OTHER FEATURES	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✗
CUSTOMIZABLE	✓
MOBILE FEATURES	
IOS APP	✗
ANDROID APP	✗
NATIVE WEB APP	✓
HOSTING METHOD	
CLOUD	✓

ON-PREMISE	✔
FURTHER INFORMATION	

Project-SalesAchiever

SOFTWARE SCREENSHOTS




360 HOK Architects
Overview
News
Information
Notes
Lists
Actions
Contacts
Projects
Quotes
Opportunities
Companies
Rates
Rights
Reports
Name
360 HOK Architects
Address
6155 Park South Drive
City
Charlotte
State
North Carolina
Zip
28210
Country
United States
Area
Telephone, Fax & Web
1-800-915-3597
1-800-915-3596
www.360inc.com
Type
Currency
English (United States)
Company Type
Client - Potential
Location
Map
Satellite
Projects
New Project Link
Edit Link
Copy Project Link
Copy Project
Delete Link
Project
Contact
New Action
Search
Clear
Drag a column header here to group by that column
Project Title
Role
Site City
Selling Status
Market
Value to us
First Name
Last name
2334 High Road - PROJECT
ABC Cooler Project
ABILENE CHRISTIAN RECR...
ALLEN CO HIGH SCHOOL PH 2
Apartments - Washington
No. Of Projects: 12
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Created by
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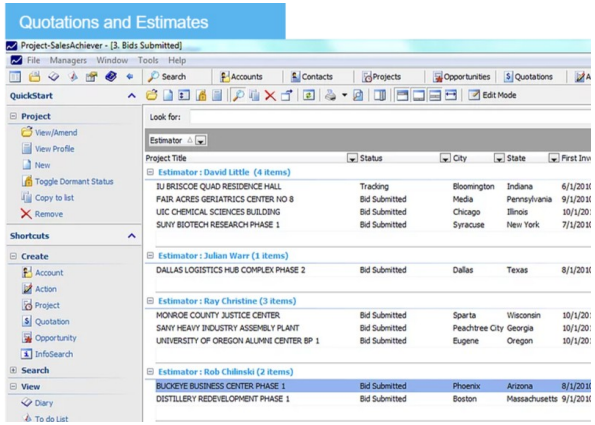
Last Edited on
10/20/2015
Last Edited by
PSAGO
Profile
Re-Subscribe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File
Managers
Window
Tools
Help
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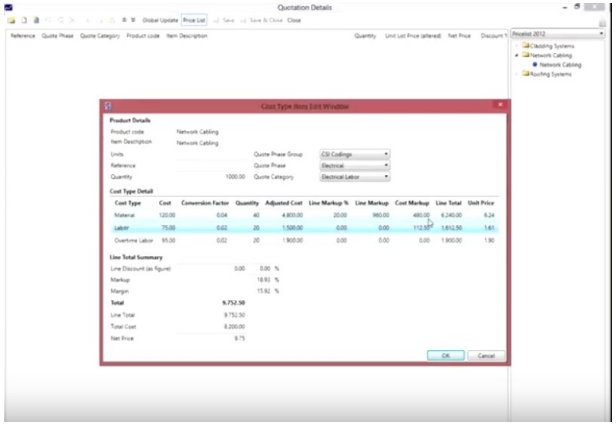
Accounts
Contacts
Projects
Opportunities
Quotations
QuickStart
Edit Mode
Project
View/Amend
View Profile
New
Toggle Dormant Status
Copy to list
Remove
Shortcuts
Create
Account
Action
Project
Quotation
Opportunity
InfoSearch
Search
View
Diary
To do List
Look for:
Estimator
Project Title
Status
City
State
Estimator : David Little (4 items)
IU BRISCOE QUAD RESIDENCE HALL
FAIR ACRES GERIATRICS CENTER NO 8
UIC CHEMICAL SCIENCES BUILDING
SUNY BIOTECH RESEARCH PHASE 1
Estimator : Julian Warr (1 items)
DALLAS LOGISTICS HUB COMPLEX PHASE 2
Estimator : Ray Christine (3 items)
MONROE COUNTY JUSTICE CENTER
SANY HEAVY INDUSTRY ASSEMBLY PLANT
UNIVERSITY OF OREGON ALUMNI CENTER BP 1
Estimator : Rob Chilinski (2 items)
BUCKEYE BUSINESS CENTER PHASE 1
DISTILLERY REDEVELOPMENT PHASE 1
Bid Submitted
Tracking
Media
Chicago
Syracuse
Dallas
Sparta
Peachtree City
Eugene
Phoenix
Boston
Bloomington
Pennsylvania
Illinois
New York
Texas
Wisconsin
Georgia
Oregon
Arizona
Massachusetts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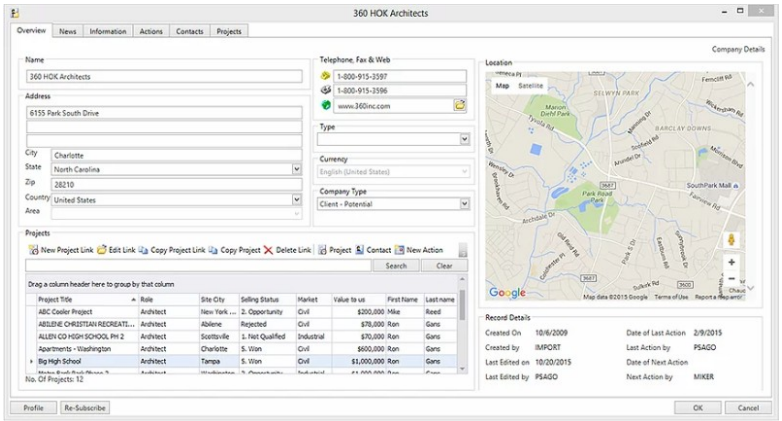
Cost Type Item Edit Window
Product Details
Cost Type Detail
Line Total Summary
OK
Cancel


360 HOK Architects
Overview
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Contacts
Projects
Company Details
Name
360 HOK Architects
Address
6155 Park South Drive
City
Charlotte
State
North Carolina
Zip
28210
Country
United States
Area
Telephone, Fax & Web
1-800-915-3597
1-800-915-3596
www.360inc.com
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Drag a column header here to group by that column
Project Title
Role
Site City
Selling Status
Market
Value to us
First Name
Last name
ABC Cooler Project
ABILENE CHRISTIAN RECREATI...
ALLEN CO HIGH SCHOOL PH 2
Apartments - Washington
Big High School
No. Of Projects: 12
Record Details
Created On
10/6/2009
Created by
IMPORT
Last Edited on
10/20/2015
Last Edited by
PSAGO
Date of Last Action
2/9/2015
Last Action by
PSAGO
Date of Next Action
Next Action by
MIKER
Profile
Re-Subscribe
OK
Cancel